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AUTHOR	Giffard, Andre; Guegnard, Christine; Strietska-Ilina, Olga
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ABSTRACT

A pilot study on the hotel, catering, and tourism sector was conducted in the Burgundy region of France, Northwest region of the Czech Republic, and Podravje region of Slovenia. Three main kinds of factors of change were brought out. The first, evoked in Slovenia and the Czech Republic, concerned the opening of borders. Typical trends were positive impact of globalization, access to new markets and potential customers, future access to structural policies of the European Union, and region's geographical position. The second factor related to customers becoming more demanding in terms of prices, quality, diversity, and sophistication of services. The third factor focused on new technologies modifying channels of communication, forms of advertising, and organization of services. The regions had similar expectations concerning additional professional skills. Most important were knowledge of foreign languages and digital technology, new techniques for food preparation and preservation, and business skills. Companies generally recognized the usefulness of continuing training. Training content was similar and involved skills in cookery, table service, hygiene, customer relations, marketing, and management. Major findings were submitted to or discussed with trade-union representatives and public and state authorities at national and regional level in the three countries. (YLB)

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Training & Employment

A QUARTERLY NEWSLETTER FROM CEREQ AND ITS ASSOCIATED CENTRES

FORECASTING TRAINING NEEDS IN THE HOTEL, CATERING AND TOURISM SECTOR: A Comparative Analysis of Results from Regional Studies in Three European Countries

The European Union's recent LABOURatory project on "Regular Forecasting of Training Needs" was intended to explore labour-market information systems and methods in four EU Member States (France, Germany, Ireland and the Netherlands) and to compare them with data availability and applicable methods in three candidate countries (Czech Republic, Poland and Slovenia). The ultimate goal of the project, which was carried out under the Leonardo da Vinci programme, was the elaboration of a methodology for forecasting training needs that would be applicable in the context of labour markets in transition economies, as well as the improvement of existing prognostic approaches in EU Member States.

The transition countries are subject to the same trends as affluent Western economies: rapid technological change and demand for a highly skilled workforce, de-industrialisation and a shift to the service sector. What form will future developments take? How will these affect demands for skills in the transition countries? How can these countries integrate the experiences of Western European countries?

The LABOURatory project had two main components: the first dealt with the elaboration of a model for quantitative nationwide forecasting, while the second focused on different qualitative and semi-quantitative methods which were applied at sectoral level in one selected region. The remarks that follow concern findings related to the latter component of the project.

The pilot study on the hotel, catering and tourism sector was conducted in the Burgundy region of France, the Northwest region of the Czech Republic and the Podravje region of Slovenia. In all three countries, this sector generates a substantial share of employment; if its multiplier effect on other sectors, notably commerce, is taken into account, it represents nearly 5 percent of employment in France, almost 7 percent in Slovenia and close to 16 percent in the Czech Republic.

The regional focus of the pilot study is no coincidence, insofar as the results of nationwide quantitative forecasts are rarely valid at a disaggregated level. Both regional and sectoral forecasts thus help to verify national quantitative models and provide a useful complement to them. At the same time, such regional analytical approaches contribute to a better qualitative understanding of emerging qualifications and skills shortages in terms of specific local features.

In order to identify qualifications needs and their future evolution, a survey was initiated in all three countries during the last three months of the year 2000. A different questionnaire was used in each country, but a certain number of common items were included so as to test the relevance of the enquiry in each of the three regions analysed. The main objective of the survey, conducted by in-person or telephone interviews with company managers or owners, or heads of personnel departments, was to bring out the nature of existing jobs, the factors of change for the occupations in the sector, the impact on the different employment and human-resources policies and co-operation with training providers and others. It was not intended to provide statistically exhaustive results (given the limited size of the sample) but to determine whether a relatively

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LABOURatory:
A Project Involving Six European Countries

LABOURatory ("Regular Forecasting of Training Needs: Comparative Analysis, Elaboration and Application of Methodology") was a two-year project (1999-2001) funded by the European Commission under the Leonardo da Vinci Programme, Surveys and Analyses strand (CZ/98/2/06469/EA/III.2.a/Count).[1] In order to adapt methods of medium-term forecasting for application in unstable economic circumstances, the partners undertook three forms of activity:

- Comparison of existing methods of forecasting training needs in each partner country (see *"Forecasting Education and Training Needs in Transition Economies: Lessons from the Western European Experience"*, Czech National Observatory of Vocational Education and Training, Prague, 1999);
- Use of quantitative forecasting methods to elaborate synthetic models with adjustable tools for iteration and reconstruction. Closely following Irish and Dutch methodologies, the partners calculated comprehensive time-series data on employment trends and forecasts of flows of future graduates by level and field of study and elaborated various indicators of employment/recruitment prospects;
- Use of qualitative approaches with particular attention to individual country environments and existing systems of information gathering. Slovenia and the Czech Republic thus applied elements of French qualitative methods at regional level in one sector which is well developed in all three countries (hotel-catering-tourism). Both quantitative and qualitative results were verified and, where necessary, adjusted through extensive discussions with the social partners, the experts involved in the surveys and those working in the hotel and catering industry.

similar survey could be devised, whether the approach offered opportunities for productive comparative analyses and whether such a methodology involving limited-scale but in-depth analysis would be worth using in future surveys.

The prospective approach applied in the three European regions was developed along two main lines:

- **First, the identification of recent qualitative evolutions**, in order to bring out the factors of change at work in the sector, present hiring and training policies, and anticipated demands for skills and qualifications;
- **Second, the validation and further development of the diagnosis** within a working group composed of public authorities, trade-union and employers' association representatives and independent experts, which attempted to produce scenarios anticipating future employment and training needs in the sector.

IDENTIFYING FACTORS OF CHANGE IN THE CZECH REPUBLIC AND SLOVENIA

In the regions surveyed, three main kinds of factors were brought out. The first, evoked in Slovenia and the Czech Republic, concerns the opening of the borders. Typical trends cited include the positive impact of globalisation, access to new markets and potential customers, future access to the structural policies of the European Union and the region's geographical position. The sector has been expanding in recent years and still has considerable potential for further growth. The second major factor relates to the changing nature of consumer demand. In all three regions analysed, customers have become more demanding in terms of prices and quality, as well as the diversity and sophistication of services. The third factor bears on the new technologies, which are modifying channels of communication, forms of advertising and the organisation of services.

In addition to such factors of change, the surveys conducted in Slovenia and in the Czech Republic disclose various development trends, including the spread of information centres for tourists and increasing links between regional businesses and the institutional or political players involved in the tourism sector. Slovenia, for example, considers "mutual linkage and connections" an asset. Today, it is increasingly necessary to link the development of the hotel and catering sector with that of the tourism industry's information systems.

In the Czech Republic, the tourism industry thus manifests a twofold nature. On the one hand, the sector's attractiveness and special charm are largely tied to its traditionalism, which has deep roots in the hospitality sector and would thus seem to constitute an obstacle to dynamic change. On the other hand, innovative forms of organisation—such as tourist information centres with information systems linked to travel agencies, hotels, transportation, pools of freelance guides, interpreters and others, regional development agencies and regional and local administration—actively contribute to the sector's development.

DEFINING THE SKILLS REQUIRED IN THE THREE REGIONS

The three surveys reflect similar expectations concerning the additional professional skills to be developed in the future. The most important of these are knowledge of foreign languages and digital technology, new techniques for food preparation and preservation and business skills. It is highly significant, however, that these skills are often required within complex configurations where the traditional competences of the hospitality sector are expected to be complemented, for example, with IT and database skills or a sophisticated understanding of regional development and ecology. As a result, we find that training needs differ according to the level of responsibility in the company. Managers traditionally face more requirements than regular employees and are the ones who benefit the most from

A Survey in Three European Regions

The questionnaire survey was conducted through interviews with 48 company managers in Burgundy, 83 in Podravje and 24 in the Northwest region of the Czech Republic. In Slovenia and France the sample mainly included micro-firms of fewer than 10 employees. In the Czech Republic, small and medium-sized companies accounted for a larger share of the sample: 6 companies had between 25 and 100 employees and 2 companies had more than 100 employees. The businesses surveyed included traditional and fast-food restaurants, taverns, hotels, cafés, travel agencies and tourist information centres.

1. The findings presented here reflect only the views of the authors; the European Commission is not liable for any information or opinions expressed in this article.

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participation in training. This situation is not specific to the sector or the countries or regions under consideration, however, for such a trend is found everywhere.

It is worth noting, however, that no radical transformation of the traditional hotel and catering trades was evoked in the regions queried. Nevertheless, beyond the common results for these three regions, a detailed examination of the data reveals certain differences of assessment. This is especially the case with cooking and catering: while hygiene problems were evoked in Burgundy relative to the new European standards (hazard analysis critical control point), this issue was never cited in the other countries.

DETERMINING TRAINING POLICIES

The majority of employees in the sector have received some kind of vocational training. In the Podravje region, only 4 percent are rated as underskilled, while in Burgundy the proportion reaches 20 percent. In Slovenia, more than half the employees have a basic level of education and 45 percent have completed secondary school and some kind of higher education. In Burgundy, the survey sheds further light on their profile: according to company heads, 70 percent of the employees have received training in the hotel and catering trades.

In all three regions, companies generally recognise the usefulness of continuing training, although they do not share the same perception of it. In the Northwest region of the Czech Republic, "38 percent of the companies surveyed were not buying any training services, and some regarded personal growth and the improvement of qualifications as a strictly individual matter for the employee. Underlying these tendencies, in terms of both goals and practices concerning the scope and content of continuing training for staff, we can definitely see the effect of the low skills structure which is typical of this sector and is associated with the nature of work activities and the typical distribution of activities among different staff members." In the Podravje region, "Although companies are aware of the importance of additional education and training and the incorporation of lifelong learning into their development strategy, the opinion of one-fourth of the companies surveyed that additional education and training is not necessary constitutes a serious concern". In Burgundy, meanwhile, "Few employers provide continuing training: about 50 people recently received training, which amounts to 10 percent of the permanent workforce. In all, 17 restaurants were involved, two-thirds of which are companies with more than 10 employees. Most of these training activities are carried out in compliance with the companies' legal obligation to finance training".[2]

Table 1. Required skills

Podravje/Slovenia	Northwest/Czech Republic	Burgundy/France
German English	Foreign languages	Foreign languages
Interpersonal skills	*Interpersonal skills*	
Food preparation *Food/dessert presentation*	*Manual skills specific to the sector* Broad occupational base Technical skills Specific occupational knowledge	Hygiene, Food safety *Preservation techniques, lighter cuisine, more diversified menus*
Computer skills	*Computer skills*	Computer skills
Designing travel packages	Strategic planning Creativity	
Service Preparing tables		
Commercial skills Sales skills Marketing	Financial skills *Sales skills* Marketing	Sales skills
Expertise on wine		
Management skills	*Management skills* Management and teamwork	

Note: This table summarises the skills requirements indicated by companies during the survey. The boxed skills are those most desired. The skills in *italics* are those mentioned from time to time and the skills in normal characters are those rarely mentioned.

The content of the training provided is similar in all three countries and involves skills in cookery, table service, hygiene, customer relations, marketing and management. The length of the training sessions is short, usually one week. In Slovenia and the Czech Republic, three obstacles to the spread of continuing training are cited: the high cost of the training, the distance between the workplace and the training site and the inappropriateness of the training to company needs. The development of the sector is also heavily affected by the seasonal nature of tourism, for companies do not as a rule invest in the training and development of a temporary workforce. In addition, the sector continues to suffer from wages that are below the national average (e.g., the Czech Republic). Nevertheless, relatively high unemployment in some of the regions studied (e.g., Northwest Bohemia) minimises recruitment problems for employers. Thus, the situation does not encourage internal development of human resources given that a large pool of workers is available among the unemployed. In Burgundy, companies mention time constraints and the difficulty of finding replacements for employees in training, and they

2. The July 1971 law on continuing training requires French employers to finance training under the so-called legal financing obligation. Companies are not required to provide training to their employees; they can choose instead to pay the totality of their mandatory contribution to the Treasury or designated agencies certified by law. At present, the minimum amount of this contribution is 0.25% of the gross wage bill for companies with fewer than 10 employees, and 1.5% of the gross wage bill for companies with 10 or more employees.

also question the usefulness of specific off-the-job training ("You learn on the job"). Improving the situation clearly requires overcoming such obstacles; one solution evoked is joint funding of training.

DEVELOPING A SHARED DIAGNOSIS

One of the specific features of the methodology used for the qualitative approach is the review of the survey's preliminary findings (taken as working hypotheses) in the light of observations and comments solicited from the social partners and practitioners in the sector. Major findings were thus submitted to and/or discussed with trade-union representatives and public and State authorities at national and especially regional level in the three countries. In Burgundy, for instance, the analysis of the findings was developed and validated through two meetings with public authorities (representatives of the Regional Council and the State) and trade-union representatives. In the Czech Republic, three meetings of focus groups were organised with regional experts from the State and the public administration, trade unions, experts from the education branch, tourist agencies and others. In Slovenia, five company representatives or officials from tourism bodies were also involved in the exchange.

In case of the Czech Republic, the issue of the relationship between schools and companies was dealt with more specifically, notably in terms of the recruitment of graduates from the educational system, the degree of employer satisfaction and the forms of co-operation between education and business. The findings indicate that there is no major lack of co-operation between schools and companies. The forms of co-operation most often mentioned by the companies include taking on students to provide them with practical work experience and discussing "possibilities of obtaining school-leavers for jobs and [company] participation in the school-based educational process".

As for the Podravje region, several findings from the survey were validated: the development of a "voucher system" (training credit), the promotion of distance training, the use of information technologies and mastery of modern communications tools. Greater involvement of the secondary schools is deemed necessary in order to stem the decline in the number of young people training as waiters and overcome the lack of skills in certain occupations in the hotel and catering sector.

In Burgundy, in addition to skills forecasts, the discussion focused on another, more difficult subject: while practically the same number of young people seek to work in this sector from one year to another, it is difficult to get them to stay. The problem does not seem to lie with the training system and its responsiveness but rather, with the need to improve working conditions in the companies themselves.

On the basis of this experience, we would emphasise that the methodology developed for qualitative analysis can serve as a complement to a quantitative survey and thus, in this instance, bring out current needs and future challenges facing the hotel and catering sector. Many findings were similar in all three regions; apart from differences of degree or implementation, only the extent of their validity differs. It is worth noting, moreover, that the prospective approach is extremely appropriate for promoting greater involvement of the different participants in the socio-economic process insofar as the diagnosis and forecasting scenarios are shared.

André Giffard, Education office/Dafco
Christine Guégnard, Céreq/Irédu
OREF Burgundy
Olga Strietska-Ilina,
Czech National Observatory
Project leader

Quantitative forecasting

In addition to the qualitative approach, the joint effort of the seven countries was intended to define the necessary conditions for the implementation of a quantitative forecasting approach. On the basis of a methodology developed by the Research Centre for Education and the Labour market (ROA) at the University of Maastricht and advice from the Economic and Social Research Institute (ESRI) in Dublin, the partners from the Warsaw School of Economics in Poland, as well as those from the Centre for Economic Research and Graduate Education, Charles University (CERGE-EI) in the Czech Republic, sought to adapt existing macro-economic models to their countries. The particular position of France is noteworthy: while an absence of recent quantitative studies was signalled at the outset of the work programme, the end was marked by the resumption of national forecasting analyses in 2001, including those developed by the BIPE for the Ministry of Education (Education Economy Employment Mission) and that proposed by the Ministry of Employment and Solidarity (Dares) under the name of FLIP-FLAP.

FRENCH RESEARCH CENTRE FOR THE ANALYSIS OF OCCUPATIONS, VOCATIONAL EDUCATION AND TRAINING

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